

HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

ANNUAL PERFORMANCE REPORT USER GUIDE



March 2021
Version 1.4

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IS APR QUICK SHEET

This page provides a quick overview of the HEP IS Annual Performance Report system and how to use it.

The APR was revised in October 2020 in an effort to make it more concise and easier to complete.

Returning users should take note of the following changes:

- A. There is now one standard APR format for all programs. There are no longer sections or questions that are unique to certain programs.
- B. Except where noted, answers are limited to 1500 characters (approximately 250 words).
- C. Some long questions in the old Section 1 that required very long answers have been broken down into shorter, more focused questions allowing for briefer answers to each.
- D. Questions pertaining to Focus Area Outputs (in the old Section 3B) have been removed from the APR entirely. You no longer need to report on Focus Areas.
- E. Some grantees will see a new Section 5 pertaining to Institutionalization.

We recommend you review this entire User Guide to learn more about how each part of the system works so you can fully understand the Title III/Title V annual performance reporting process.

1. **Log in to <https://hepis.ed.gov> with your username and password**

See **Chapter II** of this user guide for more details about logging into the system.

2. **Review and update your institution and grantee contact information**

See **Chapter V** for more about the Grantee Information section.

3. **Complete all Sections of the Annual Performance Report**

See **Chapters VI-X** for more details about each Section of the report.

4. **Review, Certify, and Submit your Annual Performance Report**

See **Chapter XI** for more information about these steps.

For complete details about this entire process, please read this **User Guide** and the **Blank APR Form (all grants)**, both of which are available for download at <https://hepis.ed.gov/help>.

I. About the Annual Performance Reporting System

The Institutional Service Annual Performance Reporting (IS APR) system is used to collect performance data from Title III and Title V grantees for the previous academic year. For example, if you are reporting during the early months of **2021**, the data you're submitting should reflect the **2019-20** academic period.

Title III and Title V grant programs are designed to improve academic quality, institutional management and fiscal stability, and strengthen physical plants and endowments of institutions of higher education, with an emphasis on institutions that enroll large proportions of minority and financially disadvantaged students.

The Title III and Title V Annual Performance Report consists of the following sections:

- Section 1:** Executive Summary
- Section 2:** Institutional Profile
- Section 3:** Grant Project Status and Budget
- Section 4:** Legislatively Allowable Activities
- Section 5:** Institutionalization

To complete your report, you will need the following materials:

1. Your original grant application notice (GAN)
2. Any previously submitted Annual Performance Reports
3. Your grant expenditure information
4. Evaluation/outcome data for the current reporting year

The data you submit is used to help determine if substantial progress is being made toward the goals of your grant, which in turn is used to help determine continuance of funding. Timely submission of annual performance reports is important to remain in compliance with the terms of your grant.

The online reporting tool is designed to ask only those questions that apply to your specific grant program. If you are unsure about how to answer any of the questions, or if you need clarification on anything related to the content of your report, please contact your Program Officer.

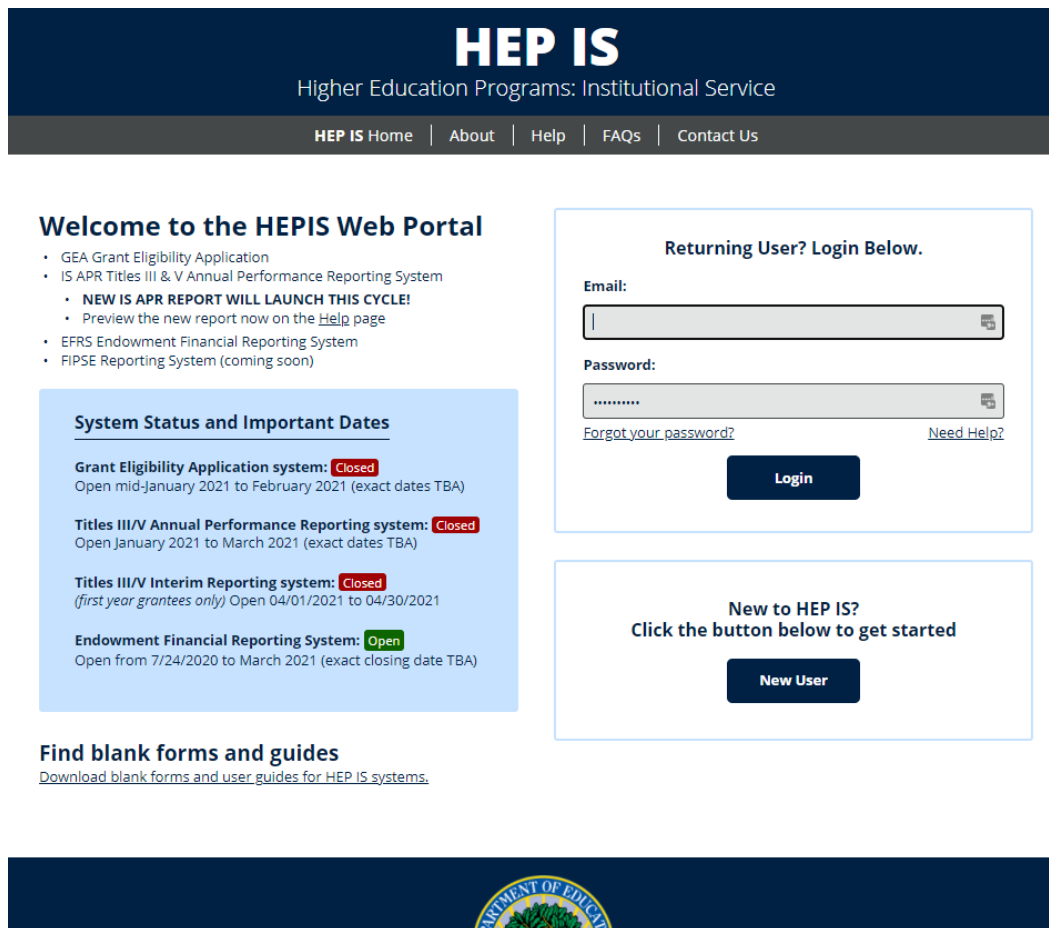
If you have any questions or issues of a technical nature related to the use of the website, please contact the Help Desk. IS APR help desk staff are not qualified to answer any questions of a programmatic nature related to your grant or the content of your report.

The IS APR system typically opens shortly after the start of the calendar year and remains open for approximately 60 days (*note: these dates have been affected by the COVID-19 pandemic*). Always refer to the homepage for the current opening and closing dates.

For more about the programs see: <https://www2.ed.gov/about/offices/list/ope/itudes/index.html>.

II. HEP IS Home Page

After accepting a standard disclaimer regarding usage of a Federal website, you will be able to access the HEP IS system home page.



The screenshot shows the HEP IS Home Page. At the top is a dark blue header with the text "HEP IS" in large white letters, followed by "Higher Education Programs: Institutional Service" in smaller white letters. Below this is a navigation bar with links: "HEP IS Home", "About", "Help", "FAQs", and "Contact Us". The main content area is divided into two columns. The left column has a section titled "Welcome to the HEPIS Web Portal" with a bulleted list of links: "GEA Grant Eligibility Application", "IS APR Titles III & V Annual Performance Reporting System" (with a sub-link "NEW IS APR REPORT WILL LAUNCH THIS CYCLE!"), "Preview the new report now on the Help page", "EFRS Endowment Financial Reporting System", and "FIPSE Reporting System (coming soon)". Below this is a light blue box titled "System Status and Important Dates" containing four entries: "Grant Eligibility Application system: Closed" (Open mid-January 2021 to February 2021), "Titles III/V Annual Performance Reporting system: Closed" (Open January 2021 to March 2021), "Titles III/V Interim Reporting system: Closed" (first year grantees only, Open 04/01/2021 to 04/30/2021), and "Endowment Financial Reporting System: Open" (Open from 7/24/2020 to March 2021). Below this box is a link "Find blank forms and guides" with a sub-link "Download blank forms and user guides for HEP IS systems.". The right column has a white box titled "Returning User? Login Below." with fields for "Email:" and "Password:", a "Forgot your password?" link, a "Need Help?" link, and a "Login" button. Below this is another white box titled "New to HEP IS? Click the button below to get started" with a "New User" button. At the bottom of the page is a dark blue footer with the Department of Education seal.

1. Main Menu Links:

- HEP IS Home** - return to the home page
- About** - learn more about the HEPIS website and each of its subsystems.
- Help** - access User Guides, blank forms, and other helpful resources
- FAQs** - review answers to frequently asked questions
- Contact Us** - fill out a contact form to request assistance from the Help Desk (staffed Mon-Fri, 9 am-5 pm Eastern time; telephone support is not available)

- System Status and Important Dates** - important information about when subsystems are opening and when reports are due (i.e., subsystem closing dates) with an indicator showing whether the system is currently Open or Closed.

3. **New User** - click the New User button to request a new user account for yourself or a colleague.
4. **Blank forms and guides** - another link to the *Help* page in the main menu.
5. **Login fields:**
 - a. **Email** - your username is your email address
 - b. **Password** - do not share your password with anyone; if additional users need to work on your APR they *must* have their own accounts
 - c. **Forgot your password** - click here to request a link via email to reset your password
 - d. **Need help** - another link to the *Contact Us* page in the main menu
 - e. **Login** - after entering your username and password, click this button to login

A. New User Accounts

If you need a new user account, click the **New User** button and enter your email address into the field provided. The system will check to see if your email is already registered.

If your email address is not in the system, you'll be presented with a form to request a new user account. Make sure you provide the new user's:

- First Name
- Last Name
- Email Address,
- Institution Name, and
- Grant PR Number (from your GAN letter).

Please allow up to one business day for new accounts to be created.

User Accounts: Email addresses *must* match the server name of the grantee institution. Accounts will not be created for personal email addresses (gmail.com, aol.com, etc.) or for third parties who do not have email addresses that match the grantee institution.

B. Two-Factor Authentication

All Federal websites are required to include **TWO-FACTOR AUTHENTICATION** in the login process. You may have seen this on other websites, especially those for banks and credit card companies.

Two-factor authentication requires that you login first with something you *know* (i.e., your username and password), and then with something you *have* (e.g., your phone).

You'll have the option to authenticate to the HEPIS website by means of:

- a smartphone app,
- a text message, or
- a voice telephone call.

You'll authenticate by confirming a request in the app, or by entering a 6-digit code onto the website that you receive by text or by telephone call.

The smartphone app is the recommended option, but we realize not everyone will have the access or the desire to use an app.

No matter which method you choose, the website will walk you through the setup process step by step. Setting it up will take less than five minutes, and using it each time you login will take only a few seconds.

Returning Users: If you do not have access to the office phone number you set up as your second factor authenticator last year because you're working from home due to COVID-19 , please contact the Help Desk for assistance in resetting your authentication method.

III. HEP IS Dashboard

After you successfully log into the system, you will be on your HEP IS Dashboard. From here you can access any of the subsystems contained within the HEP IS system that you may need.

The screenshot shows the HEP IS dashboard. At the top is a dark blue header with the text "HEP IS" in large white letters, followed by "Higher Education Programs: Institutional Service" in smaller white text. Below this is a dark grey navigation bar with links: "HEP IS Home", "About", "Help", "FAQs", "Contact Us", "Account", and "Logout". Below the navigation bar is a light grey box with the text "Welcome [redacted]". Below this is a section titled "ISAPR - Annual and Interim Performance Reports" in a dark blue box. Underneath is a light blue box with the text "Your grants in the ISAPR system:". Below this is a table with the following columns: "PR#", "Report Type", "Data Entry Window", "Status", and "Enter System". The table has one row with the following data: "PR#" is [redacted], "Report Type" is "APR", "Data Entry Window" is "02/09/2021 - 04/09/2021", "Status" is "In Progress", and "Enter System" is a green button with the text "GO".

PR#	Report Type	Data Entry Window	Status	Enter System
[redacted]	APR	02/09/2021 - 04/09/2021	In Progress	GO

Your landing page may look different from the image shown above. You will see a list of the subsystem(s) and grant(s) which you are permitted to access. If you are not required to work in the other subsystems and if you only have one grant, then your dashboard may only show one option.

The main menu has two additional links now that you're logged in:

1. **Account** - click here to change your password and manage your two-factor authentication method(s)
2. **Logout** - click here to end your user session and logout of the system

To enter the Annual Performance Reporting subsystem, click the GO button in the Enter System column on the row that includes your PR Number (masked in the image above, your PR number is an 11-character string starting with the letter P that represents your grant number, and it can be found in your GAN letter).

IV. IS APR Home Page

The IS APR home page will display a Welcome Letter from the Director.

ISAPR

Institutional Services Annual Performance Reporting System

About | Help | FAQs | Contact Us | Account | Logout

IS APR Home

Grant Identification

Section 1
Executive Summary

Section 2
Institutional Profile

Section 3
Grant Project Status and Budget

Section 4
Legislatively Allowable Activities

Section 5
Institutionalization

Review and Certification

View Report(s)

← HELP

Welcome [REDACTED]

PR/Award Number: [REDACTED] Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [REDACTED] Program Officer: [REDACTED]

Director's Letter

Dear Project Director:

The Office of Postsecondary Education's Institutional Service group uses this web-based data collection system for Title III and Title V grantees to enter their annual performance reports.

All Title III and Title V grantees with a budget period that ended on September 30, 2020 are required to complete an annual performance report. Please ensure that the executive summary is updated with current goals and objectives and reflects any programmatic or budgetary revisions approved during the course of the year.

The executive summary, and the report as a whole, should show substantial progress on grant activities, objectives and goals (or provide explanatory detail, if challenges hindering substantial progress have been faced) in order to receive a non-competing continuation grant.

The purpose of the data collection is to:

- Report progress on meeting the goals and objectives of the grant and report any delays and challenges for grant implementation;
- Assess both the individual achievements of the projects and the collective achievements of the programs;
- Improve program monitoring and technical assistance; and
- Compile a summary of grantee goals, objectives, activities, and best practices as grant periods end.

Institutional Service will compile a final report of project goals, objectives and activities for each grant ending September 30, 2020. The data will be assembled from grantees' individual annual reports received throughout the grant cycle.

For grantees whose grant ended September 30, 2020, your Executive Summary should include narrative information regarding the overall results of the grant. In Sections 3 and 4 of the report, you should include data relevant only to the annual performance period ending September 30, 2020.

Please click the Contact Us link if you have any technical questions. Questions about the content of your report should be directed to your Program Officer.

From the IS APR home page you can navigate to the following sections:

1. **Grant Identification** - every year you should review your Institution and Contact details and make any updates necessary, see Chapter V
2. **Section 1: Executive Summary** - enter summaries of your accomplishments, see Chapter VI
3. **Section 2: Institutional Profile** - enter details about your institution, see Chapter VII
4. **Section 3: Grant Project Status and Budget** - enter details about activities, objectives, performance measures, and costs, see Chapter VIII
5. **Section 4: Legislatively Allowable Activities** - link grant activities to legislative goals, then enter related budget information, see Chapter IX
6. **Section 5: Institutionalization** - enter information about institutionalizing the grant's activities, see Chapter X

7. **Review and Certification** - verify that all sections are complete, certify that all data is accurate, and submit your report, see Chapter XI
8. **Reports** - download PDFs of reports, see Chapter XII

Navigation Tip: You may work on the sections in any order you like with one exception: you *must* enter at least *one* Activity on **Tab 3B** in Section 3 before you can start working on Section 4 or Section 5. Sections 4 and 5 require you to enter details about your Activities, so you have to enter them first.

This is indicated in the side menu by Sections 4 and 5 being greyed out. After the required data has been entered in Section 3, then Sections 4 and 5 will be accessible on the side menu.

V. Grant Identification

Each year you should review your Institution and Contact details and make any updates necessary.

IS APR Home

Grant Identification

Section 1
Executive Summary

Section 2
Institutional Profile

Section 3
Grant Project Status and Budget

Section 4
Legislatively Allowable Activities

Section 5
Institutionalization

Review and Certification

View Report(s)

← HEP

ISAPR

Institutional Services Annual Performance Reporting System

About | Help | FAQs | Contact Us | Account | Logout

Welcome [Redacted]

PR/Award Number: [Redacted] Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [Redacted] Program Officer: [Redacted]

IS APR Home / Grant Identification

Grant Identification

Please verify the information below and click the 'Save and Continue' button to begin your report. If someone other than the project director is entering the report, please enter your name and contact information in the data entry fields.

General Information

PR Award Number: [Redacted] Program: [Redacted]

Unit ID: [Redacted]

Grantee Name (Institution Name):
[Redacted]

Address 1:
[Redacted]

Most of the information in this section will be pre-populated for you. Please review the information carefully to make sure that it is accurate. Make any corrections necessary and fill in any missing fields, especially the names and contact information for the Project Director (required) and an Additional Contact Person (optional, but recommended). Remember that adding their details here *does not* create user accounts for them. If they need user accounts, please contact the Help Desk.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to Section 1.

TIP: The system has an automatic “save as you go” feature that helps prevent data loss in case you lose your connection or get pulled away in the middle of your work. The system performs automatic background saves as you work your way down the page, which will minimize potential data loss.

VI. Section 1: Executive Summary

The Executive Summary allows you to “tell the story” of your grant’s impact at your institution. During extensive grantee outreach activities, ED program staff heard the grantee community’s need to place project goals and outcomes in an institutional context. ED has responded to this need by designing open-ended questions in the Executive Summary.

This section allows you to report on successes and challenges that cannot be articulated purely through quantitative responses. Each response is limited to a certain length as noted on screen.

IS APR Home

Grant Identification

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View Report(s)

← HEP

ISAPR

Institutional Services Annual Performance Reporting System

About | Help | FAQs | Contact Us | Account | Logout

Welcome [Redacted]

PR/Award Number: [Redacted] Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [Redacted] Program Officer: [Redacted]

IS APR Home / **Section 1**

Section 1: Executive Summary

All questions are limited to 1500 characters or less (approximately 250 words) unless otherwise stated. Keep in mind that all questions, unless otherwise stated, pertain to the reporting period indicated above.

1. The goals of Titles III, V, and VII grants are to strengthen an institution's capacity to serve low-income and minority students. Use the following questions to summarize how your grant is enabling your institution to fulfill the legislative intent of the Titles III, V, or VII program during the most recently completed grant period.

You have 1500 character(s) left.

1a. Summarize the impact your institution's Titles III, V, or VII grant has had on enrollment this year.

Click **Save** at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

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VII. Section 2: Institutional Profile

In Section 2, you'll provide information about your Institution and the GPRA Indicators.

IS APR

Institutional Services Annual Performance Reporting System

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IS APR Home

Grant Identification

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View Report(s)

← HEP

Welcome **University of California**

PR/Award Number: **Fall 2019** Reporting Period: **10/1/2019 to 09/30/2020**

Grantee Name: **University of California** Program Officer: **David P. (David P.)**

IS APR Home / **Section 2**

Section 2A

Section 2B

Section 2C

Section 2D

Section 2E

Institutional Measures (GPRA Indicators)

Complete the following table up through the current Reporting Period. Your "Total Fall Enrollment" and "Fall to Fall Retention %" should come from the Fall Census Data.

Note: You must complete the table up through the current Reporting Period in order to submit your report.

A. Tab 2A: Institutional Measures (GPRA Indicators)

On Tab 2A, we collect information pertaining to the GPRA Indicators. Enter your enrollment, retention, and degree information for your institution for every year shown. The first column should represent the year *before* your grant started. Any data you entered on previous APRs will be displayed here so you don't have to reenter it every year.

Section 2A

Section 2B

Section 2C

Section 2D

Section 2E

Institutional Measures (GPRA Indicators)

Complete the following table up through the current Reporting Period. Your "Total Fall Enrollment" and "Fall to Fall Retention %" should come from the Fall Census Data.

Note: You must complete the table up through the current Reporting Period in order to submit your report.

Grant Year Collection Year	Pre-Grant (2017-18)	Year 1 (2018-19)	Year 2 (2019-20)	Year 3 (2020-21)	Year 4 (2021-22)	Year 5 (2022-23)
Total Fall Enrollment	7,715	7,979	8,383			
Fall-to-Fall Retention %	47	47	47			
2-Year Graduation Rate (2-Year)	37	36	42			
4-Year Graduation Rate (2- & 4-Year)	0	0	0			

Save

Save and Continue to Section 2B

Two-Year Schools will be asked about their 2-Year and 4-Year Graduation Rates, as shown above.

Four-Year Schools will be asked about their 4-Year and 6-Year Graduation Rates (not shown).

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

B. Tab 2B: Institutional Leadership

On Tab 2B answer questions pertaining to your Institution's leadership and any changes that may have occurred during the reporting period.

The screenshot shows a web interface for 'Section 2B: Institutional Leadership'. At the top, there are five tabs: 'Section 2A', 'Section 2B' (which is active and highlighted in dark teal), 'Section 2C', 'Section 2D', and 'Section 2E'. Below the tabs, the title 'Institutional Leadership' is displayed. A teal-colored note box states: 'Note: You must answer all questions in order to submit your report.' Below this, there are two questions, each with 'Yes' and 'No' radio button options. Question 1 asks: '1. Have there been changes in institutional leadership (presidents, vice-presidents, provosts, etc.) or in the Grant Leadership (project director, activity director, etc.)?' Question 2 asks: '2. Have there been changes in grant leadership (project director, activity director, etc.)?' At the bottom of the form, there are two buttons: 'Save' and 'Save and Continue to Section 2C'.

Section 2A **Section 2B** Section 2C Section 2D Section 2E

Institutional Leadership

Note: You must answer all questions in order to submit your report.

1. Have there been changes in institutional leadership (presidents, vice-presidents, provosts, etc.) or in the Grant Leadership (project director, activity director, etc.)?

☐ Yes ☐ No

2. Have there been changes in grant leadership (project director, activity director, etc.)?

☐ Yes ☐ No

Save **Save and Continue to Section 2C**

Conditional Logic: Some Yes/No questions throughout the report have conditional follow-up questions that will appear only if your initial answer requires follow up information.

Please note that if you *change* your initial response back to the condition that does *not* require any follow up information, the system will ask you to confirm that it is okay to delete your initial selection.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

C. Tab 2C: Accreditation

On Tab 2C answer questions pertaining to your Institution's accrediting agency. If your accrediting agency is not listed in the choices provided, select Other and enter the name in the field provided.

The screenshot shows a web-based form interface with five tabs at the top: Section 2A, Section 2B, Section 2C (which is the active tab), Section 2D, and Section 2E. The main content area is titled "Accreditation". Below the title is a teal-colored note box that reads: "Note: You must answer all questions in order to submit your report." Below the note is a horizontal line, followed by question 1: "1. Which is your institution's primary accrediting agency? [Please check only one]". There are five radio button options listed vertically: "Middle States Commission on Higher Education", "New England Association of Schools and Colleges, Commission on Institutions of Higher Education", "The Higher Learning Commission of the North Central Association of Colleges and Schools", "Northwest Commission on Colleges and Universities", and "Southern Association of Colleges and Schools, Commission on Colleges".

Section 2A Section 2B **Section 2C** Section 2D Section 2E

Accreditation

Note: You must answer all questions in order to submit your report.

1. Which is your institution's primary accrediting agency? [Please check only one]

☐ Middle States Commission on Higher Education

☐ New England Association of Schools and Colleges, Commission on Institutions of Higher Education

☐ The Higher Learning Commission of the North Central Association of Colleges and Schools

☐ Northwest Commission on Colleges and Universities

☐ Southern Association of Colleges and Schools, Commission on Colleges

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

D. Tab 2D: Audit

On Tab 2D answer questions pertaining to an audit. Please indicate if an audit was completed that complies with 2 CFR part 200, subpart F. If there were any findings, you'll be asked to upload the reports containing those findings.

You may upload a maximum of 3 documents. Each file should be no larger than 20 MB and must be in one of the following formats: .txt, .doc, .docx, .xls, .xlsx, or .pdf.

The screenshot shows a web application interface with a top navigation bar containing five tabs: Section 2A, Section 2B, Section 2C, Section 2D, and Section 2E. Section 2D is the active tab. Below the tabs, the page is titled "Audit". A teal-colored note box states: "Note: You must answer all questions in order to submit your report." Below this, a question is displayed: "1. Institutions that expend \$750,000 worth of federal funds in one year must complete an audit annually pursuant to 2 CFR part 200, subpart F. Were you required to complete an audit pursuant to 2 CFR part 200, subpart F?". There are two radio button options: "Yes" and "No". At the bottom of the form, there are two buttons: "Save" and "Save and Continue to Section 2E".

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

E. Tab 2E: Endowment

On tab 2E answer questions pertaining to Endowment grants.

Section 2A

Section 2B

Section 2C

Section 2D

Section 2E

Endowment

Note: You must answer all questions in order to submit your report.

1. Do you have an Endowment Challenge Grant that has not matured?

☐ Yes ☐ No

2. Are grant funds from this award being used for an endowment activity?

☐ Yes ☐ No

3. Do you have an endowment activity on a previous award not matured?

☐ Yes ☐ No

If yes to any of the above questions, you will be required to complete the FY 20XX Endowment Financial Report (OMB 1840-0564) by the deadline. The report is available on the EFRS tab in this system.

Save

Save and Continue

IMPORTANT! If you indicate here that your grant has an endowment component, then you will be required to fill out an Endowment Financial Performance Report in the EFRS subsystem of HEPIS.

Endowments require twenty (20) years of annual reporting from the date of the initial corpus. Please check with your Program Officer or the EFRS system documentation for more details.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

VIII. Section 3: Grant Project Status and Budget

In Section 3 you will relate your grant activity costs to the legislative language for your particular Title III or Title V program. For most of this section you will be reporting on each activity separately. You should use the original activity structure of your application, incorporating any changes that have been approved by the program office to your original grant application.

ISAPR

Institutional Services Annual Performance Reporting System

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IS APR Home

Grant Identification

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View Report(s)

← HEP

Welcome [Redacted]

PR/Award Number: [Redacted] Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [Redacted] Program Officer: [Redacted]

IS APR Home / **Section 3**

Section 3: Grant Project Status and Budget

Grantees should describe the status of their project's objectives and activities during the reporting period, and the amount spent on each activity.

Section 3A

Section 3B

Section 3C

Section 3D

Project Objectives

Note: You must answer all questions in order to submit your report.

1. What is the overall goal of your grant?

A. Tab 3A: Project Objectives

The first step in Section 3 is to enter your Project Objectives on Tab 3A.

The screenshot shows a web interface for 'Section 3A: Project Objectives'. At the top, there are four tabs: 'Section 3A' (active), 'Section 3B', 'Section 3C', and 'Section 3D'. Below the tabs, the title 'Project Objectives' is displayed. A teal-colored note box states: 'Note: You must answer all questions in order to submit your report.' Below this, there are two numbered questions. Question 1 is '1. What is the overall goal of your grant?' followed by a large text input area. Below the input area, it says 'You have 1500 character(s) left.' Question 2 is '2. What is the expected long-term impact of the grant project on the institution?' followed by another large text input area. Below this input area, it also says 'You have 1500 character(s) left.' At the bottom of the form, there are two buttons: 'Save' and 'Save and Continue to Section 3B'.

Section 3A Section 3B Section 3C Section 3D

Project Objectives

Note: You must answer all questions in order to submit your report.

1. What is the overall goal of your grant?

You have 1500 character(s) left.

2. What is the expected long-term impact of the grant project on the institution?

You have 1500 character(s) left.

Save **Save and Continue to Section 3B**

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

B. Tab 3B: Grant Activities & Examples

The next step in Section 3 is to add your activities on Tab 3B. You should use the original activity structure of your application, incorporating any changes that have been approved by the program office to your original grant application.

First let's think about what is meant by Grant Activities, Objectives, and Performance Measures.

Grant Activities – The intended development, implementation, or restructuring of project, programs, or services. Grant activities may have multiple interconnected objectives designed to increase the success of projects, programs, and services.

Objective – The plan to affect change within an activity. Applicants develop objectives within their grant applications with the goal to achieve change within the institution. There may be multiple project objectives for each grant activity.

Performance Measure – Any quantitative indicator, statistic, or metric used to gauge GPRA, project, or performance. There may be multiple performance measures associated with each project objective.

EXAMPLE ONE:

- GRANT ACTIVITY: Increase Student Success and Student Supplemental Instruction Programs
 - OBJECTIVE: Increase the number of students eligible for admission to the XYZ Program by 10% by May 31, 2020
 - PERFORMANCE MEASURE: Number of students passing Course 101 will increase from 50 to 75 in December 2019
 - PERFORMANCE MEASURE: Number of students eligible for TEST ABC will increase from 40 to 55 by March 2020
 - OBJECTIVE: Increase the number of students eligible for admission to the XYZ Program – Level II by 10% by May 31, 2020
 - PERFORMANCE MEASURE: Number of students passing Course 101 will increase from 10 to 12 in December 2019
 - PERFORMANCE MEASURE: Number of students eligible for TEST ABC will increase from 20 to 25 by March 2020

EXAMPLE TWO:

- GRANT ACTIVITY: Decrease the time through Supplemental Instruction (non-credit) Courses into introductory college-level Math and English; baseline of 1.5 years of non-credit course work
 - OBJECTIVE: Conduct a six-week Summer Bridge Program (SBP) that enrolls 100 students during initial year
 - PERFORMANCE MEASURE: 50% of enrollees will be students from local school district

- PERFORMANCE MEASURE: 60% of students who complete all four weeks will test at least one level higher in English
- PERFORMANCE MEASURE: 45% of students who complete all four weeks will test at least one level higher in Math
- PERFORMANCE MEASURE: 65% of SBP 2021 enrollees will register and enroll in Fall 2021 courses
- PERFORMANCE MEASURE: 40% of SBP 2021 enrollees will register and enroll in Spring 2022 courses
- OBJECTIVE: Conduct a three-week Winter Bridge Program (WBP) that enrolls 30 students during initial year
 - PERFORMANCE MEASURE: 40% of enrollees will be students from local school district
 - PERFORMANCE MEASURE: 40% of students who complete all four weeks will test at least one level higher in English
 - PERFORMANCE MEASURE: 25% of students who complete all four weeks will test at least one level higher in Math
 - PERFORMANCE MEASURE: 65% of WBP enrollees will register and enroll in Spring 2022 courses
 - PERFORMANCE MEASURE: 40% of WBP enrollees will register and enroll in Fall 2022 courses

It might help to think of these records in terms of a *Family* – Parents, Children, and Grandchildren.

- The Grant Activity is the *Parent* record. Every report must have at least one Grant Activity.
- The Objective is the *Child* record. Every Grant Activity needs at least one Objective.
- The Performance Measure is the *Grandchild* record. Every Objective needs at least one Performance Measure.

Grant Activities can have more than one Objective, and Objectives can have more than one Performance Measure, but it's important to remember that they *each need at least **one** of the other*.

Section 3A **Section 3B** Section 3C Section 3D

Grant Activities

Note: You must answer all questions in order to submit your report.

Number of Grant Activities: **0**

Grantees should report on the status of their project objective (as stated in their application). Please provide the information requested for each project objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

Add an Activity

Continue to Section 3C

Start by clicking the **Add an Activity** button as shown above. That will open the Add a Grant Activity panel you'll see on the next page.

After saving your Grant Activity with its required one Objective and one Performance Measure, you may then add additional Objectives and Performance Measures to that Grant Activity as needed.

Once you save your first Activity, Sections 4 and 5 will become available on the side menu bar.

Grant Activity

Activity Description:
Please enter the name of your Activity followed by a brief description of it.

You have 1025 characters left

Note: You must add at least one objective and one performance measure for every activity in order to submit your report.

Objective

Objective Description:
Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).

You have 1025 characters left

Objective Status: On schedule ?

Performance Measure

Performance Measure Description: ?
Please enter the name of your Performance Measure followed by a brief description of it, including (a) how you will know you've accomplished the Objective, and (b) what is the evidence of that accomplishment.

You have 1025 characters left

Measure Type: ? Project **Date Measured:**

Frequency Measured: ?

Data Type: ☐ Raw Number ☐ Ratio

Target	Actual
	

Note: You must answer all questions above in order to save your objective & performance measure. If you have more than one performance measure for this objective, you can add it after you click Save.

Cancel
Save

This is a very long form so the next few pages of the User Guide look at each individual part of the form.

Grant Activity

Activity Description:
Please enter the name of your Activity followed by a brief description of it.

You have 1500 character(s) left.

Note: You must add at least one objective and one performance measure for every activity in order to submit your report.

GRANT ACTIVITY: There is only one field in this part. Enter both the NAME and a DESCRIPTION into the Activity Description field.

Objective

Objective Description:
Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).

You have 1500 character(s) left.

Objective Status: On schedule ▼ ?

OBJECTIVE: There are only two fields in this part. Enter both the NAME and a DESCRIPTION into the Objective Description field, then select the appropriate Objective Status from the drop down.

Performance Measure

Performance Measure Description: ?

Please enter the name of your Performance Measure followed by a brief description of it, including (a) how you will know you've accomplished the Objective, and (b) what is the evidence of that accomplishment.

You have 1500 character(s) left.

Measure Type: ?

Date Measured:

Frequency Measured: ?

Data
Type:

☐

Raw Number

☐

Ratio

Target	Actual
<input type="text"/>	<input type="text"/>

Note: You must answer all questions above in order to save your objective & performance measure. If you have more than one performance measure for this objective, you can add it after you click Save.

PERFORMANCE MEASURE: Enter both the NAME and a DESCRIPTION into the Performance Measure Description field. Then fill out the remaining fields.

Click the **Save** button at the bottom of the page to save your work. Once Grant Activities, Objectives, and Performance Measure are saved, they will be displayed in a collapsed manner as shown on the next page.

Number of Grant Activities: 1

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1

[Edit Activity](#)[Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1

[Edit Objective](#)[Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor...

[Edit Measure](#)[Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

****Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.**

Now that you have saved your first “family” of fields created (Grant Activity / Objective / Performance Measure), it will look like the page you see above. As you add more Grant Activities, this will become a very large page. For convenience, we display the data for you in a collapsed manner as seen above.

This view has three important sets of buttons: **Add**, **Edit**, and **Expand**. They appear in multiple places, giving you the ability to add, edit, or expand (view) exactly what you need.

ADD: Let's start with the Add buttons.

Note where each of the ADD buttons are. To add another Grant Activity, go to the *top* of the page. This will allow you to create a new “family” of fields (Grant Activity / Objective / Performance Measure)

To add another Objective (child), look for the “Add an Objective and Performance Measure...” button nested under the appropriate Grant Activity (parent).

To add another Performance Measure (grandchild), look for the “Add Another Performance Measure” button nested under the appropriate Objective (child) and Grant Activity (parent).

Number of Grant Activities: **1**

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

+ Add an Activity

Grant Activity 1/1

Edit ActivityExpand Activity

Tutoring: outreach to students to help them with their studies....

Objective 1/1

Edit ObjectiveExpand Objective

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor...

Edit MeasureExpand Measure

+ Add Another Performance Measure

+ Add an Objective and Performance Measure to Grant Activity 1

**Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.

< Add a new Grant Activity

< Add another Performance Measure *to this Objective*

< Add another Objective and Performance Measure *to this Grant Activity*

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EXPAND: Now let's move on to the Expand buttons. Click on an Expand button to view all of the data you entered, not just the abbreviated version.

Note where each of the EXPAND buttons are. To view an Activity, an Objective, or a Performance Measure, click the Expand button next to the appropriate element.

Number of Grant Activities: **1**

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1

[Edit Activity](#) [Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1

[Edit Objective](#) [Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 Improve Grades by at least one letter after one semester of tutor....

[Edit Measure](#) [Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

**Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.

< Expand Grant Activity to view its details

< Expand this Objective to view its details

< Expand this Performance Measure to view its details

When you expand an element, the Expand button changes to a Collapse button. Click the Collapse button to hide the fields that you just expanded.

When a field is “greyed out” it means it’s not editable.

Grant Activity 1/1

Edit ActivityExpand Activity

Tutoring: outreach to students to help them with their studies....

Objective 1/1

Edit ObjectiveCollapse Objective

Objective Description:
Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).

Improve student performance. Help students improve grades and information retention.

You have 1416 character(s) left.

Objective Status: On schedule

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor...

Edit MeasureExpand Measure

+ Add Another Performance Measure

< The Expand button has now changed to a Collapse button.

< Greyed Out fields are not editable. Click the Edit button to enter Edit mode.

EDIT: Now let's move on to the Edit buttons.

Note where each of the EDIT buttons are. To edit a particular Activity, Objective, or Performance Measure, click the Edit button in line with and next to the appropriate element (i.e., Grant Activity, Objective, or Performance Measure). You may only edit one element at a time.

Number of Grant Activities: **1**

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1 [Edit Activity](#) [Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1 [Edit Objective](#) [Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 Improve Grades by at least one letter after one semester of tutor... [Edit Measure](#) [Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

****Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.**

< Edit this Grant Activity

< Edit this Objective

< Edit this Performance Measure

EDIT MODE: When you enter Edit mode, the buttons change once again.

1. Click the Save button to save your changes.
2. Click the Cancel button to back out and not save any of your changes.
3. Click the Delete button to delete this element from your report.

BE CAREFUL !

There is no Undo feature and there is no Recycle bin. Once you delete something from your APR, it's gone for good. Even the Help Desk cannot get it back for you.

When you click a Delete button you will be asked, "Are you sure?" and you will have to Confirm every deletion request. It will be difficult to delete something by accident.

The screenshot shows a web form titled "Grant Activity 1/1". At the top right are two buttons: "Edit Activity" (disabled) and "Expand Activity" (active). Below the title is a text field containing "Tutoring: outreach to students to help them with their studies....". Underneath is a section for "Objective 1/1" with a text input field. To the right of this field are three buttons: "Save Objective", "Delete Objective", and "Cancel". Below the objective field is a section for "Objective Description:" with a detailed instruction: "Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).". Below this is a large text area containing the text "Improve student performance. Help students improve grades and information retention." and a character count "You have 1416 character(s) left.". Below the text area is a dropdown menu for "Objective Status:" currently set to "On schedule" with a help icon. At the bottom is a section for "Performance Measure 1/1" with the text "Improve Grades by at least one letter after one semester of tutor..." and two buttons: "Edit Measure" (disabled) and "Expand Measure" (active). At the very bottom is a button labeled "+ Add Another Performance Measure".

< Save, Delete, and Cancel buttons

< Since it's not greyed out, you may now Edit this Objective

C. Tab 3C: Budget

On Tab 3C you'll provide detailed information about your budget. The budget table allows you to enter dollar amounts for the following line item categories:

Section 3A
Section 3B
Section 3C
Section 3D

Budget

Enter your budget. If you click the "changes" box, a text field will display within that section for you to enter a line item budget narrative explaining the changes

Note: You must enter numbers in any applicable fields in the table below in order to submit your report.

A Budget Category	B Carryover Balance (Previous Year)	C Actual Budget	D Total Budget (B+C)	E Expenditures	F Non-Federal Expenditures	G Carryover Balance (Current Year)(D-E)	H Carryover Percentage (G/D as %)	I Next Year's Actual Budget	Changes
Personnel	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Fringe Benefits	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Travel	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Equipment	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Supplies	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Contractual	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Construction	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Endowment	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Other	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	% <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00	

Save
Save and Continue to Section 3D

- **Personnel:** The total amount spent on staff salaries, which are not part of "fringe benefits." Do not include consultants or other personnel who are not entitled to "fringe benefits." Include those costs under the "Other" category.
- **Fringe Benefits:** Enter the total amount used for fringe benefits, converted from your institution's percentage rate into a dollar amount.
- **Travel:** Total amount spent on transportation and per diem expenses during travel that is necessary and related to achieving the objectives of your project. Do not include freight costs or consultants' travel expenses. Include these costs in the "Other" category.
- **Equipment:** Total purchasing cost of all tangible personal property for both fixed and movable items. Include property having a useful life of more than one year and/or having an acquisition cost of \$5,000 or more per unit. Do not include the cost for renting equipment. Include these costs in the "Other" category.
- **Supplies:** Total purchasing cost of all tangible personal property having a useful life of less than one year and/or having an acquisition value of less than \$5,000 per unit.

- **Contractual:** The total cost of contractual agreements with another institution of higher education, organization or business. Do not include costs for consultants. Include these costs in the "Other" category.
- **Construction:** Total costs associated with approved construction projects (including renovation costs).
- **Endowment:** Total sum of Federal grant dollars designated as endowment dollars.
- **Other:** Include all other direct costs not covered by the other budget categories, such as training stipends, communications, freight costs (not covered in vendor purchase price), equipment rental, computer use charges, summer employment stipends, consultant costs, etc.
- **Scholarships:** (PPOHA Only)
- **Student Stipends:** (PPOHA Only)

The budget table allows reporting in each of the above categories in the following columns:

- **Carryover Balance from Previous Year:** Enter the amount of any carryover from the previous grant year before the reporting period.
- **Actual Budget:** The budget for the reporting period, which includes the negotiated budget based on your original application budget with any budget adjustments made according to your Program Officer. The total of this column should equal the award amount for the reporting period, which is included in your Grant Award Notification.
- **Total Budget:** *Automatic calculation* of columns A+B; Carryover Balance from Previous FY+Actual Budget.
- **Expenditures:** The amount of grant expenses incurred during the reporting period.
- **Non-Federal Expenditures:** The amount of non-Federal expenses incurred during the reporting period. This should include any program required matching funds such as endowment matching or HBGI matching requirements.
- **Carryover Balance:** *Automatic calculation* of columns D-E; Total Budget - Expenditures.
- **Carryover Percentage:** *Automatic calculation* of columns G/D; Carryover Balance/Total Budget
- **Next Year's Actual Budget:** The budget planned for the next fiscal year. The total costs should match the fiscal year (FY) award amount from your most recent Grant Award Notification.
- **Changes:** If your budget for the line item has changed, check the box and you will be prompted to provide additional narrative information in a pop up field on that particular line item.

Automatic calculations: in addition to the three columns containing automatic calculations that are noted above, every column will be automatically totaled in the last row of the budget table.

IMPORTANT: The "Save as You Go" feature is triggered by your cursor LEAVING a field. If it looks like the calculations in the budget table aren't working correctly, try placing your cursor in the last field you entered a number into, then press Tab to exit the field. That will trigger the last calculation.

Click **Save** at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

D. Tab 3D: Summary Budget Narrative

Tab 3D gives you the opportunity to describe any departures from the approved budget or changes to your proposed budget for the next fiscal year.

The screenshot shows a web interface with four tabs at the top: Section 3A, Section 3B, Section 3C, and Section 3D. Section 3D is selected. Below the tabs, the title "Summary Budget Narrative" is displayed. A paragraph of instructions follows: "Please explain budget changes, as needed, particularly the use of funds from cost savings, carryover funds and other expanded authorities changes to your budget. Provide an explanation if you are NOT expending funds at the expected rate. Describe any significant changes to your budget resulting from modifications of project activities." A teal note box states: "Note: You must answer all questions except Q5 in order to submit your report. Q5 is optional." Below this, three questions are listed with checkboxes for "Yes" and "No".

Section 3D

Summary Budget Narrative

Please explain budget changes, as needed, particularly the use of funds from cost savings, carryover funds and other expanded authorities changes to your budget. Provide an explanation if you are NOT expending funds at the expected rate. Describe any significant changes to your budget resulting from modifications of project activities.

Note: You must answer all questions except Q5 in order to submit your report. Q5 is optional.

1. Have all funds that were to be drawn down during this performance period been drawn down?

☐ Yes ☐ No

2. Did you have any unexpended funds at the end of the performance period?

☐ Yes ☐ No

3. Do you anticipate any changes in your budget for the next performance period that will require prior approval from the Department (as designated by EDGAR, 34 CFR 74.25 and 80.30, as applicable).

Question 5 on Tab 3D is one of the Optional questions on the report, regarding community partners.

The screenshot shows Question 5, which asks about community partners. The text of the question is: "5. Many grantees include community partners, other institutions of higher education, and secondary schools in their work. Please complete the table below (if applicable) with information related to any partners that you might be working with on your grant. Also describe if and how these partners roles have changed, and whether this had any impact on your ability to achieve your approved project objectives and/or project activities." Below the question is a teal note box: "Note: This question is optional." At the bottom of the question area is a blue button labeled "Add a Partner". Below the button is Question 6.

5. Many grantees include community partners, other institutions of higher education, and secondary schools in their work. Please complete the table below (if applicable) with information related to any partners that you might be working with on your grant. Also describe if and how these partners roles have changed, and whether this had any impact on your ability to achieve your approved project objectives and/or project activities.

Note: This question is optional.

Add a Partner

6. Do you wish to make any changes in the grant's activities for the next budget period?

In order to answer Question 5 you will need to click the Add a Partner button. When you do that a pop up window will appear as shown below.

Enter the Partner Name in the **header** row then answer all three questions and click the Save Partner Info button to return to the main screen. After saving a Partner, it will appear in the list as shown below.

Partner Name	Description
Acme Gadgets, Inc	• Text description of partner role... <div> edit delete </div>

To Edit or Delete a partner click the corresponding button on the appropriate row. To add additional partners click the Add a Partner button again.

Click **Save** at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

IX. Section 4: Legislatively Allowable Activities (LAAs)

In Section 4, you will relate your grant activity costs to the legislative language for your particular Title III or Title V program. For this section you will be reporting on each activity separately.

You must enter your Activities in Section 3 before you can begin working on Section 4.

IS APR
Institutional Services Annual Performance Reporting System

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IS APR Home

Grant Identification

Section 1
Executive Summary

Section 2
Institutional Profile

Section 3
Grant Project Status and Budget

Section 4
Legislatively Allowable Activities

Section 5
Institutionalization

Review and Certification

View Report(s)

← HEP

Welcome [redacted]

PR/Award Number: [redacted] Reporting Period: 10/1/2019 to 09/30/2020
Grantee Name: [redacted] Program Officer: [redacted]

IS APR Home / Section 4

Section 4: Legislatively Allowable Activities (LAAs)

Enter the funds expended on this activity as appropriate in the LAA table. This process will show how the funds used to carry out the grant activity relate to each of the activities that are allowed under the law.

How should I distribute the spending among the LAAs?
Instead of grouping expenditures by the standard budgetary line items this step asks you to think of activity expenses in a different way. We want you to group the expenditures according to the intent of the legislation. The specific activities expressed in the legislation should serve as the framework for the distribution of activity expenses—do your best to adopt your specific expenses with existing LAAs, but if none adequately capture your activity, you may add a category at the bottom of the table in the "Other" category. Remember that we are trying to aggregate expenses across many projects, so adhering to the LAAs to the greatest extent possible assists our program analysis.

The system will total the numbers you enter into each LAA category and display it at the bottom of the page.

Click the Edit button next to each Activity. If you need to add new Activities, go to Section 3B.

Activity	LAAs	Total Dollars Spent	
Activity 1: Text for activity description one	<u>LAAs:</u>	\$0.00	Edit
Activity 2: Text for activity description two	<u>LAAs:</u>	\$0.00	Edit
Total Dollars Spent on All Activities		\$0.00	

The text you entered on Tab 3B will appear on this page in the “Activity” column. Click the Edit button on the corresponding row to begin assigning funds to specific LAAs under that specific activity.

You will need to do this for each activity. If you need to add additional activities, return to Tab 3B in Section 3.

Distribute the funds spent on this activity according to the appropriate Legislatively Allowable Activity (LAA) displayed in the chart.

IMPORTANT: Different programs have different LAAs, so your screen may not look like the sample shown below.

If none of the LAAs in the list adequately captures all or part of your activity expense, you may add it at the bottom of the table in the “Other” category. Please use the same level of detail in the Other fields as you see used in the fixed categories displayed above.

Grant activity:
Text for activity description one

Distribute the funds spent on this activity according to the appropriate Legislatively Allowable Activity (LAA). If no LAA adequately captures all or part of your activity expense, you may add a category at the bottom of the table in “Other” category.

Note: You must put a dollar amount in at least one LAA category.

LAA Category [Note: All listed activities are directly from legislation.]	Dollars Spent
Purchase, rental, or lease of scientific or laboratory equipment for educational purposes, including instructional and research purposes.	\$ <input style="width: 150px;" type="text"/>
Construction, maintenance, renovation, and improvement in classrooms, libraries, laboratories, and other instructional facilities.	\$ <input style="width: 150px;" type="text"/>
Support of faculty exchanges, faculty development, and faculty fellowships to assist in attaining advanced degrees in the field of instruction of the faculty.	\$ <input style="width: 150px;" type="text"/>
Purchase of library books, periodicals, and other educational materials, including telecommunications program materials.	\$ <input style="width: 150px;" type="text"/>
Academic instruction in disciplines in which Black Americans are underrepresented.	\$ <input style="width: 150px;" type="text"/>
Funds management, administrative management, and acquisition of equipment for use in strengthening funds management.	\$ <input style="width: 150px;" type="text"/>
Academic tutoring, counseling, and student support service programs designed to improve academic success.	\$ <input style="width: 150px;" type="text"/>

The text you entered on Tab 3B will also appear on this page under the heading “Grant Activity.”

Enter the funds expended on this activity as appropriate in the LAA table. This process will show how the funds used to carry out the grant activity relate to each of the activities that are allowed under the law.

How should I distribute the spending among the LAAs?

Instead of grouping expenditures by the standard budgetary line items this step asks you to think of activity expenses in a different way. We want you to group the expenditures

according to the intent of the legislation. The specific activities expressed in the legislation should serve as the framework for the distribution of activity expenses—do your best to adopt your specific expenses with existing LAAs, but if none adequately capture your activity, you may add a category at the bottom of the table in the "Other" category. Remember that we are trying to aggregate expenses across many projects, so adhering to the LAAs to the greatest extent possible assists our program analysis.

The system will total the numbers you enter into each LAA category and display it at the bottom.

Click the Edit button next to each Activity. If you need to add new Activities, go to Section 3B.

Activity	LAAs	Total Dollars Spent	
Activity 1: Text for activity description one	LAAs: <ul style="list-style-type: none"> Services necessary for the implementation of projects or activities that are described in the grant application and that are approved, in advance, by the Secretary, except that not more than two percent of the grant amount may be used for this purpose. Dollars Spent: \$50,000.00 	\$50,000.00	Edit
Activity 2: Text for activity description two	LAAs: <ul style="list-style-type: none"> Construction, maintenance, renovation, and improvement in classrooms, libraries, laboratories, and other instructional facilities. Dollars Spent: \$20,000.00 Acquisition of real property in connection with the construction, renovation, or addition to or improvement of campus facilities. Dollars Spent: \$10,000.00 	\$30,000.00	Edit
Total Dollars Spent on All Activities		\$80,000.00	

[Continue to Section 5](#)

After you've finished entering LAA expenditures for each of your activities, the total dollars you spent on each activity will be totaled on each row, and the total dollars spent on all activities will be displayed in the bottom row.

Click **Continue** to proceed to the next Section.

X. Section 5: Institutionalization

All grants must complete Section 5, which addresses your plans to institutionalize, or to assume the costs incurred from the projects and activities created from this grant. The goal is for continuity in the work begun by this grant and work performed after the grant period ends.

You must enter your Activities in Section 3 before you can begin working on Section 5.

Section 5: Institutionalization

What are your institution's plans to institutionalize or assume the costs incurred from the projects and activities created from this grant? The desire is for there to be continuity in the work begun by this grant and the work that is done in the future. Detail your plans to accomplish that goal.

Note: You must answer all questions in order to submit your report.

1. The activities you entered in Section 3 should appear in the table below. Describe your institutionalization plan for each activity, and list the approved line item(s), and financial cost.

We recognize that data related to institutionalization may not be available during the current reporting period. Please contact your Program Officer if you have questions about completing this section.

Project Activity	Details
Project Activity 1 Text for activity description one Financial Cost (\$) <input type="text"/>	Approved Line Items <input type="text"/> <small>You have 1500 character(s) left.</small> Institutionalization Plan <input type="text"/> <small>You have 1500 character(s) left.</small>
Project Activity 2 Text for activity description two Financial Cost (\$) <input type="text"/>	Approved Line Items <input type="text"/> <small>You have 1500 character(s) left.</small> Institutionalization Plan <input type="text"/> <small>You have 1500 character(s) left.</small>

2. In the space provided below please explain any notable experiences you have had in institutionalizing this project. Please list any considerable challenges, successes, or failures.

Answer all three questions for each activity. If you need to add more Activities, return to Tab 3B in Section 3.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

XI. Review and Certification

The Review and Certification Section serves three tasks:

1. **Review:** Check your APR for completeness and verify that all questions on the report have been answered
2. **Certification:** Certify that all information on the report is true and correct to the best of your knowledge
3. **Submit:** Send your report to the Department.

ISAPR
Institutional Services Annual Performance Reporting System

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Welcome **[REDACTED]**

PR/Award Number: **[REDACTED]** Reporting Period: **10/1/2019 to 09/30/2020**
Grantee Name: **[REDACTED]** Program Officer: **[REDACTED]**

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Review and Certification

Review

Certification

Submit

Review Your Report

Please ensure that all sections below are complete (green check mark). If a section is incomplete, click the "Go to Section" button and add the missing information.

Section 1: Executive Summary		
!	1: Executive Summary	Go to Section

Section 2: Institutional Profile		
!	2A: Institutional Measures (GPRA)	Go to Section

A. Review

On the Review tab you will be shown the completion status for each section of the report. A green check mark indicates a section is complete; a red exclamation point indicates it is not.

You may click the **Go to Section** button or click the desired Section option in the left hand menu to return to any section and complete the remaining questions. All questions on the report are required except where indicated.

Review

Certification

Submit

Review Your Report

Please ensure that all sections below are complete (green check mark). If a section is incomplete, click the "Go to Section" button and add the missing information.

Section 1: Executive Summary		
!	1: Executive Summary	Go to Section

Section 2: Institutional Profile		
!	2A: Institutional Measures (GPRA Indicators)	Go to Section
!	2B: Institutional Leadership	Go to Section
!	2C: Accreditation	Go to Section
!	2D: Audit	Go to Section
!	2E: Endowment	Go to Section

Section 3: Grant Project Status and Budget		
✓	3A: Project Objectives	Go to Section
✓	3B: Grant Activities	Go to Section
✓	3C: Budget	Go to Section
✓	3D: Summary Budget Narrative	Go to Section

Section 4: Legislatively Allowable Activities (LAAs)		
✓	4: LAAs	Go to Section

Section 5: Institutionalization		
✓	5: Institutionalization	Go to Section

Continue to Certification

When all sections are marked complete, you will be able to click Continue to go to the Certification tab.

B. Certification

The Certification tab allows your Certifying Official to enter their name and contact information, which serves as an electronic signature. Their electronic signature certifies that all information on the report is true and correct to the best of their knowledge.

First verify that the information at the top of the tab is correct. If any changes need to be made, either click the **Return to Grant Identification Page to Edit** button, or click the Grant Identification option at the top of the left hand menu.

Review

Certification

Submit

Certification

Review the information below. If any of the items in 3-5 need to be changed, return to the Grant Identification page and update it there. Otherwise, please enter the authorizing representative information and click the Save and Continue button. You do not need to send a signed certification form to ED or upload a signed certification form.

1. Reporting Period

10/1/2018 to 09/30/2019

2. PR Award Number

P000X000000

3. Project Title

Excellent Grant Project

4. Recipient Information

Name: Community State College University

Address: 1200 State Capital Boulevard, State Capital, US 12345

5. Contact Information

Name: Jane Doe

Title: Project Director

Phone: (888) 555-1212

Email: jane.doe@commstatecolluniv.edu

Return to Grant Identification Page to Edit

6. Authorized Representative

(The Institutions President or someone with the institutional authority to sign off on federal sponsored agreements) **To the best of my knowledge and belief, all data in this performance report are true and correct.**

Name

Email

Phone

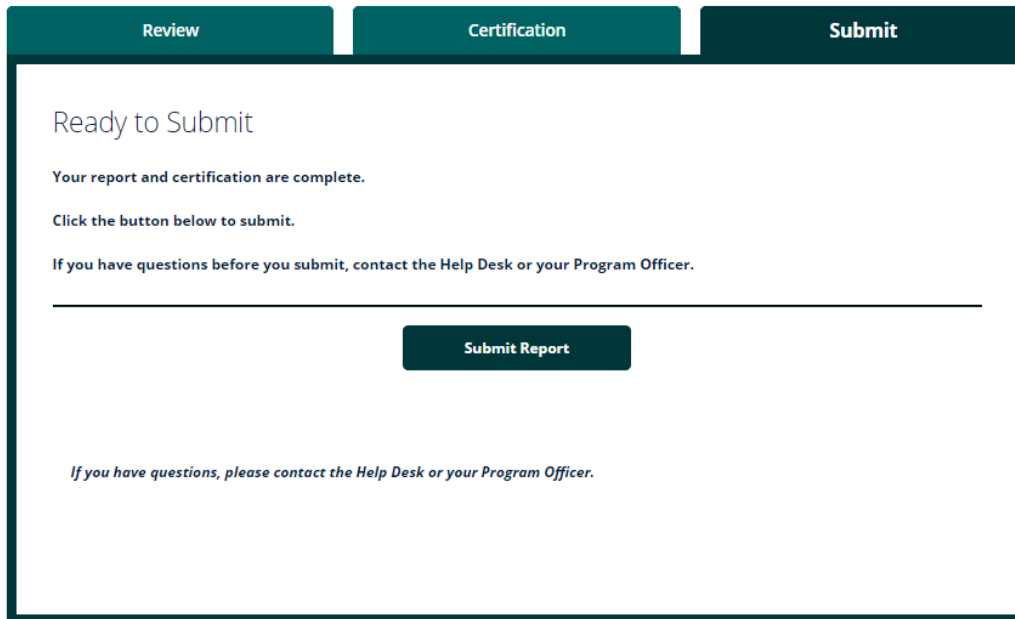
Date

Save and Continue

You do not need to upload, mail, or fax a signed certification form to the Department.

A. Submit

Once your report has passed the completion review and your Certifying Official has entered their electronic signature, you will be able to Submit your report.



The screenshot shows a web interface with three tabs at the top: 'Review', 'Certification', and 'Submit'. The 'Submit' tab is active. The main content area is titled 'Ready to Submit' and contains the following text: 'Your report and certification are complete.', 'Click the button below to submit.', and 'If you have questions before you submit, contact the Help Desk or your Program Officer.' Below this text is a dark green button labeled 'Submit Report'. At the bottom of the content area, there is a line of italicized text: 'If you have questions, please contact the Help Desk or your Program Officer.'

Simply click the **Submit** button to send your report to the Department. You will receive an email confirmation upon submission, containing a link where you can download a copy of your report.

IMPORTANT: Please remember to download and retain a copy of your submitted report in your local records!

You do not need to upload, mail, or fax a hard copy of the report to the Department.

B. Unsubmit

Once your report is submitted it is locked and you cannot make any further changes.

If you need to make changes to your submitted report **before** the submission deadline and the system closes, simply contact the Help Desk and they will “unsubmit” your report for you.

You will then be able to login as normal, make any edits as needed, and resubmit the report yourself.

You do not need to contact the Help Desk to resubmit your report.

XII. View Reports

Click the View Report(s) tab to print a copy of your current year’s report on this tab. If your report has not yet been submitted, it will have a Draft indicator in each page header.

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Section 2
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Section 3
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Section 5
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View Report(s)



ISAPR
Institutional Services Annual Performance Reporting System

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Welcome [redacted]


PR/Award Number: [redacted] Reporting Period: 10/1/2019 to 09/30/2020
Grantee Name: [redacted] Program Officer: [redacted]

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View Reports

Current Year

[APR Report DRAFT](#)



In an upcoming release you will also be able to access a list of your previously submitted reports and attachments.